Create Travel Advance

Step 1	**Step 2**	**Step 3**
From the CalATERS web site at http://www.sco.ca.gov/calaters_global.html Under Global Sign In, click CalATERS Global.	Key User ID and Password, and then click **Logon**.	Click the **New** icon to begin the Travel Advance form. Select "Travel Advance Form".

Step 4	**Step 5**	**Step 6**
Select the appropriate claim type, and then click **Ok**. Key the Report Name (based on department policy), and then click **Ok**.	From the General tab, click to select the check delivery option. Complete any additional fields.	Enter the date (or select date from the dropdown calendar) to indicate when check is needed.

Create Travel Advance

Step 7

Click on the Travel Advance Information tab.

Click ▼ and then click **Advance**.

Step 8

Enter the amount you are requesting by typing on the amount field, or by using the dropdown calculator.

Step 9

Enter the Start and End Date by typing the date, or by using the dropdown calendar.

> Amount: 250.00
> Trip Start Date: / /
> Trip End Date: / /

Enter the Destination and Purpose of your Travel.

> Destination:
> Purpose:

Then, click **Enter**

Step 10

Go to the Completion tab.

If there are Review Items, you may need to provide explanation(s).

Step 11

Proceed to Submission tab.

The Submission tab displays your approver.

Enter password and click **Submit**.

Step 12

Select print options and **Print Preview**.

The Summary Sheet displays.

Travel Advance Summary Sheet

ADVANCE REQUEST INFORMATION		TOTALS
Name	Edward Cullen	Total Travel Advance Amount 250.00 USD
Form ID	TAF00000563	
Approver	Professor Plum	
Report Name	Training - San Diego	

Advance Check Method	Pick up
Advance Date Needed	08/30/12

ADVANCE DATA SUMMARY

Start Date	End Date	Amount	Destination	Purpose	Authorization Number
08/30/12	08/31/12	250.00	san Diego	Training	

TRAVEL ADVANCE EXCEPTIONS

Text	Response	Policy
TA forms should be submitted at least 5 calendar days prior to trip dates(advance amount 250.00). Explanation: k		TA

Click **Print** and then click **Done**.

The form will be sent to the next approver for review.